



London Breed, Mayor

Department of Human Services  
 Department of Disability and Aging Services  
 Office of Early Care and Education

Trent Rhorer, Executive Director

MEMORANDUM

**TO:** AGING & ADULT SERVICES COMMISSION

**THROUGH:** SHIREEN McSPADDEN, EXECUTIVE DIRECTOR

**FROM:** CINDY KAUFFMAN, DEPUTY DIRECTOR  
 ESPERANZA ZAPIEN, ACTING DIRECTOR OF CONTRACTS

**DATE:** DECEMBER 2, 2020 *js for EZ*

**SUBJECT:** NEW GRANTS: MULTIPLE GRANTEES (NON-PROFIT) FOR THE PROVISION OF LEGAL SERVICES FOR OLDER ADULTS  
 (see table on the next page)

**GRANT TERMS:** 1/1/21-6/30/24

<b>GRANT AMOUNTS:</b>	\$5,272,838	<u>Contingency</u> \$527,283		<u>Total</u> \$5,800,121	
<b>FUNDING SOURCE</b>	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
<b>ANNUAL AMOUNT</b>	\$3,585,530		\$1,687,308	\$527,283	\$5,800,121
<b>PERCENTAGE</b>	68%		32%		100%

The Department of Disability and Aging Services (DAS) requests authorization to enter into new grant agreements with multiple providers for the provision of legal services for older adults during the period of January 1, 2021 through June 30, 2024, in the combined amount of \$5,272,838 plus a 10% contingency for a total not to exceed amount of \$5,800,121. The specific breakdown of funding per grantee is summarized in the following table.

<i>Grantee</i>	<i>1/1/21- 6/30/21</i>	<i>Annual</i>	<i>Annual X3</i>	<i>Total</i>	<i>10% Contingency</i>	<i>Total Not to Exceed</i>
Asian Americans Advancing Justice – Asian Law Caucus	\$106,607	\$213,214	\$639,642	\$746,249	\$74,625	\$820,874
Asian Pacific Islander Legal Outreach (DBA of Nihonmachi Legal Outreach)	\$90,979	\$181,958	\$545,874	\$636,853	\$63,685	\$700,538
La Raza Centro Legal	\$67,500	\$135,000	\$405,000	\$472,500	\$47,250	\$519,750
Legal Assistance to the Elderly	\$341,187	\$682,373	\$2,047,119	\$2,388,306	\$238,831	\$2,627,136
Open Door Legal	\$69,848	\$139,696	\$419,088	\$488,936	\$48,894	\$537,830
UC Hastings College of the Law – Medical Legal Partnership for Seniors	\$77,142	\$154,284	\$462,852	\$539,994	\$53,999	\$593,993
<b>Total</b>	<b>\$753,263</b>	<b>\$1,506,525</b>	<b>\$4,519,575</b>	<b>\$5,272,838</b>	<b>\$527,283</b>	<b>\$5,800,121</b>

### **Background**

Legal services can be critical to maintaining or securing a better quality of life for older adults. DAS' legal services providers work to provide their clients with information and advice designed to allow them to make informed decisions and assert their rights on a variety of issues. Legal services program providers help eligible clients with a variety of legal issues, which may include public benefit eligibility determinations and appeals, housing rights and eviction prevention, consumer fraud, and debt collection issues, elder abuse prevention, simple will preparation, disability planning and advance directives, and immigration matters.

### **Services to be Provided**

Grantees will operate a legal services program offering legal information and representation for older adults in need of assistance. Grantees have and will continue to develop legal expertise in areas most impacting older adults; Grantees are also expected to be informed about changes in the law that might affect the provision of services. Grantees should be as culturally and linguistically competent as possible to serve a diverse San Francisco population while also being experienced and knowledgeable about working with an older adult population.

Grantees will each offer an initial intake process for clients in need of legal services. Upon completion of screening, further services will fall into one of the following modules of service:

1. Information and Referral – the client concern is more appropriately referred to another service for assistance.

2. Advise and Close – the client issue is very easily addressed, advice is provided and the case is closed.
3. Brief Services – the client is in need of assistance to prepare legal correspondence, fill out an official form, review legal documents, etc.
4. Case Acceptance – the client issue warrants more extensive legal representation and a case file is opened, e.g. elder abuse, consumer fraud, reasonable accommodation for housing, etc.

Outcomes for legal services assistance can include stabilizing or improving a housing situation, increasing or maintaining an income source, securing protective court orders against someone harming a vulnerable client, or deterring predatory collection and illegal business practices targeting an older adult.

### **Coronavirus Pandemic and Impact on Services**

At the implementation of the City's shelter-in-place order in March 2020, DAS legal services providers halted all in-office operations, shifting services to phone and virtual options. This remains the preferred and primary mode of service delivery among DAS funded legal providers. With the development of public health guidance on safe operations for staff and clients, legal service providers now offer limited instances of in-office services when alternatives are not available. These in-office operations utilize office technology to connect clients virtually to staff (located elsewhere in the office or off-site) or use of physical barriers and restricted staffing on site for socially distanced transactions. While client utilization of services dropped off initially with the switch in service access, it has steadily grown through the remainder of 2020. Looking forward, DAS legal services are expected to be near or at pre-COVID service levels in terms of clients served and legal service hours provided.

### **Grantee Selections**

Grantees were selected through Request for Proposals (RFP) 864, Legal Services for Older Adults, which was competitively bid in January 2020.

### **Funding**

Funding will be provided through a Federal (32%) and County General Funds (68%).

## **ATTACHMENTS**

### **Asian Americans Advancing Justice – Asian Law Caucus**

Appendix A- Services to be Provided

Appendix B- Program Budget

### **Asian Pacific Islander Legal Outreach (DBA of Nihonmachi Legal Outreach)**

Appendix A- Services to be Provided

Appendix B- Program Budget

### **La Raza Centro Legal**

Appendix A- Services to be Provided

Appendix B- Program Budget

**Legal Assistance to the Elderly**

Appendix A- Services to be Provided

Appendix B- Program Budget

**Open Door Legal**

Appendix A- Services to be Provided

Appendix B- Program Budget

**UC Hastings College of the Law – Medical Legal Partnership for Seniors**

Appendix A- Services to be Provided

Appendix B- Program Budget

## APPENDIX A

### ADVANCING JUSTICE – ASIAN LAW CAUCUS

#### LEGAL SERVICES FOR OLDER ADULTS

January 1, 2021 – June 30, 2024

#### I. Purpose

The purpose of this grant is to ensure the rights and entitlements of older adults by providing legal assistance.

#### II. Definitions

California State Bar	The State Bar of California is the regulatory agency for the State's lawyers, charged with admitting and disciplining attorneys.
CARBON	Contracts Administration, Reporting, and Billing Online System
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment
Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
Grantee	Advancing Justice – Asian Law Caucus
HSA	Human Services Agency of City and County of San Francisco
Legal Assistance	Legal advice and representation provided by an attorney to older individuals with economic or social needs; and includes – (i) to the extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of an attorney;

and (ii) counseling or representation by a nonlawyer where permitted by law. Direct legal assistance may be provided face-to-face, by telephone, or by electronic communication and includes, but is not limited to, advice and consultation, litigation, administrative representation, brief services, preparing legal documents and pro se assistance.

LGBTQ+	An acronym/term used to refer to persons who self-identify as non-heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 100% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
OAA	Older Americans Act
OCP	Office of Community Partnerships
Older Adult	Person who is 60 years or older, used interchangeably with senior
Senior	Person who is 60 years or older, used interchangeably with older adult
SOGI	Sexual Orientation and Gender Identity; Ordinance No. 159-16 amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9).

### III. Target Population

According to the federal mandates of the Older Americans Act, services must target clients who are members of one or more of the following groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income
- Limited English proficiency
- Minority
- Frail
- Member of LGBTQ+ Community

### IV. Eligibility for Services

- 1) A resident of San Francisco *and*
- 2) Aged 60 and above

### V. Location and Time of Services

Advancing Justice – Asian Law Caucus’ offices are located at 55 Columbus Avenue. Services are offered Monday through Friday during regular business hours.

### VI. Description of Services

Legal service providers will help eligible clients with a variety of legal issues which may include benefit appeals, eviction prevention, consumer fraud/issues, elder abuse prevention, simple will preparation, disability planning and advance directives, debt collection issues, and immigration matters. Legal service providers will often work in conjunction with other service providers to carefully assess and triage client needs.

Clients seeking legal services will go through an initial screening process. Legal providers will then categorize the services they provide into one of the following four modules:

- 1) Information and Referral – the concern is more appropriately referred to another service for assistance
- 2) Advise and Close – the legal issue is very easily addressed, advice is provided and the case is closed
- 3) Brief Services – the client is in need of assistance to prepare legal correspondence, fill out an official form, review legal documents, etc.
- 4) Case Acceptance – the legal issue warrants more extensive legal representation and a case file is opened, e.g., elder abuse, consumer fraud, challenging eviction petitions, etc.

Grantee will be provided with a copy of the California Department of Aging’s California Statewide Guidance for Legal Assistance. Grantee is expected to use these Guidelines in the

provision of OAA legal services. While non-binding, the Guidelines should be considered for guidance and technical assistance in the provision of services.

Areas of expertise for legal service Grantees should include at least one of the following:

- 1) Income/Nutrition: Supplemental Security Income (“SSI”), Social Security, pensions/retirement, CalFresh/Supplemental Nutrition Assistance Program (SNAP), unemployment
- 2) Housing/Utilities: Tenant rights, real property, utilities
- 3) Long-term Care: Skilled Nursing Facility (SNF) issues, community-based, long-term care services
- 4) Healthcare: MediCal, Medicare, managed care, provider/services access, private insurance
- 5) Protective Services/Elder Abuse/Defense against Conservatorship: Conservatorship issues with a focus on defending older persons against guardianship as called for in the OAA § 321(a)(6)), restraining orders, abuse/neglect, exploitation, advanced planning/autonomy/advance directives
- 6) Consumer: Bankruptcy/debt, contracts/warranties, scams/identity theft
- 7) Civil Rights: Limited English Proficient (LEP) rights, discrimination, immigration

Clients can expect that the legal service provider is experienced and knowledgeable about working with an older adult population. Grantee is expected to keep up with changes in the law that affect older adults, particularly in the issue areas in which services are provided. Grantee will further assure that services delivered are consistent with professional standards for this service. Grantee should be as culturally and linguistically competent as possible to serve an ethnically diverse population.

Legal services provided and to be reported under this grant will meet the definition of Legal Assistance as described in the Definitions section above. Legal Assistance will be recorded by number of hours of Legal Assistance provided.

Grantee agrees to meet on a quarterly basis or as needed with other legal service providers and the Office of Community Partnerships staff to help develop and maintain a comprehensive citywide approach to legal service programs funded by DAS.

Grantee will serve as the lead agency among other DAS funded legal services providers in the production of a quarterly legal newsletter. This will include being responsible for the planning, development, and distribution of the newsletter, as well as collaborating with the other legal services providers to publish the newsletter content. Content will be printed in multiple languages and cover legal topics most relevant to the target population.

\*\*\*Grantee shall continue to follow guidance in or instructions from health care providers, the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments relating to COVID-19. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements.



These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving services.

## VII. Service Objectives

For the period 1/1/21 – 6/30/21:

- Grantee will serve 65 unduplicated clients.
- Grantee will provide 972 units of service of Legal Assistance. A unit is one hour of Legal Assistance.
- Grantee will provide 100 units of service of staffing hours to support the publication of a legal services newsletter as an outreach and educational tool. Staffing hours will include: attending planning meetings, researching, writing, editing, and sending copy to be published, and distribution.

On an annual basis, starting July 1, 2021:

- Grantee will serve 130 unduplicated clients.
- Grantee will provide 1,945 units of service of Legal Assistance. A unit is one hour of Legal Assistance.
- Grantee will provide 200 units of service of staffing hours to support the publication of a legal services newsletter as an outreach and educational tool. Staffing hours will include: attending planning meetings, researching, writing, editing, and sending copy to be published, and distribution.

## VIII. Outcome Objectives

Grantees will participate in a quarterly reporting process designed by Office of Community Partnership (OCP) staff. Reporting on outcomes through this framework will demonstrate and measure the impact, outcomes, and results of legal services provided. Outcome measures originally developed by the State Bar of California serve as the basis for this reporting framework.

Collecting outcomes through this manner will allow DAS and Grantee to track positive outcomes in a particular contract year as well as comparing the outcomes from year to year. Results may help establish benchmarks for performance in future years.

Grantee will, on a quarterly basis, complete and submit to OCP a report on program performance which includes the following:

- Total clients served including aggregate demographic information

- Total hours of legal assistance provided.
- Total number of cases opened during the quarter
- Total number of cases closed during the quarter
- Categorization of level of service for each case closed during the quarter (Information and Referral, Advise and Close, Brief Service, Case Acceptance).
- Recording of each case closed into standardized categories based on legal issue assisted with (e.g. housing, income maintenance, consumer/finance).
- Categorization of each case closed within a series of standardized outcomes (e.g. obtained, preserved, or increased disability or age related benefit; prevented loss of current housing, etc.) as defined by the State Bar of California.
- Community education, outreach efforts, and client narratives

Completion of quarterly reporting will be done via an online portal developed and supported by OCP analyst staff. Reporting periods and deadlines will be as follows:

- 1st Quarter (covering July, August, September) due October 25<sup>th</sup> each year
- 2nd Quarter (covering October, November, December) due January 25<sup>th</sup> each year
- 3rd Quarter (covering January, February, March) due April 25<sup>th</sup> each year
- 4th Quarter (covering April, May, June) due July 25<sup>th</sup> each year

## **IX. Additional Reporting Requirements**

Grantee will provide various reports during the term of the grant agreement:

- A. The grantee will enter into the CA GetCare Service Unit section all Service Objectives by the 5th working day of the month for the preceding month.
- B. Monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system and include Service Objectives
- C. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report shall be submitted via the CARBON system.
- D. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10th (for July 1-December 31 data) and July 10th (for January 1-June 30 data)
- E. Grantee shall develop and deliver ad hoc reports as requested by DAS/HSA.
- F. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis; Grantee will maintain evidence of staff completion of this training.
- G. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.

- H. Pursuant to California Department of Aging requirement, Grantor reserves the right to reduce funding available for this contract in the event that actual costs are below funding levels initially budgeted for the delivery of services.
- I. Grantee will develop a Grievance Policy consistent with Office on the Aging Program Memorandum #33 - Consumer Grievance Policy.
- J. Through the Older Americans Act Area Plan development process, the City of San Francisco identifies “Focal Points” which are designed to help older adults and adults with disabilities connect to services throughout the City. These Focal Points are:

Designated Community Focal Point	Address
Western Addition Senior Center (BHPMSS)	1390 1/2 Turk St, San Francisco, 94115
Bayview Senior Connections (BHPMSS)	1753 Carroll Ave, San Francisco, CA 94124
OMI Senior Center (CCCYO)	65 Beverly St, San Francisco, 94132
Richmond Senior Center (GGSS)	6221 Geary Blvd, San Francisco, 94121
Mission Neighborhood Centers	362 Capp St, San Francisco, CA 94110
30th Street Senior Center (On Lok)	225 30th St, San Francisco, 94131
Openhouse Bob Ross LGBT Senior Center	65 Laguna St, San Francisco, CA 94102
Downtown SF Senior Center (NCPHS)	481 O’Farrell St, San Francisco, 94102
Aquatic Park Senior Center (SFSC)	890 Beach St, San Francisco, 94109
Self-Help for the Elderly	601 Jackson St, San Francisco, 94133
Geen Mun Activity Center (SHE)	777 Stockton St, San Francisco, 94108
South Sunset Activity Center (SHE)	2601 40th Ave, San Francisco, 94116
West Portal Clubhouse (SHE)	131 Lenox Way, San Francisco, 94127
Toolworks	25 Kearny St, San Francisco, 94108
Independent Living Resource Center San Francisco	825 Howard Street, San Francisco, CA 94103
DAS Benefits and Services Hub	2 Gough St, San Francisco, 94103

- K. For assistance with reporting requirements, submission of reports, or other questions related to this grant please contact:

Reanna Albert  
 Program Analyst, Office of Community Partnerships  
 DAS  
 P.O. Box 7988  
 San Francisco, CA 94120-7988  
[reanna.albert@sfgov.org](mailto:reanna.albert@sfgov.org)

and

Elizabeth Leone  
Contract Manager  
Human Services Agency  
PO Box 7988  
San Francisco, CA 94120-7988  
(415) 355-3607  
[elizabeth.leone@sfgov.org](mailto:elizabeth.leone@sfgov.org)

## **X. Monitoring Activities**

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on CA-Getcare, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; evidence of provision of the California Department of Aging (CDA) Security Awareness training to staff; program operation, which includes a review of a written policies and procedures manual of all OCP-funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of directors list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool; translation and social services are based on staff hours.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of the Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, MOUs, the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	C	D	E	F
1	Appendix B, Page 1					
2	<b>HUMAN SERVICES AGENCY BUDGET SUMMARY</b>					
3						
4						
5						
6	Asian Americans Advancing Justice / Asian Law Caucus				1/1/2021 to 6/30/2024	
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
8	If modification, Effective Date of Mod. No. of Mod.					
9	Program: Legal Services for Older Adults FY21-24					
10	Budget Reference	1/1/2021- 6/30/2021	7/1/2021- 6/30/2022	7/1/2022- 6/30/2023	7/1/2023- 6/30/2024	TOTAL
11	Program Term					
12	<b>Expenditures</b>					
13	Salaries & Benefits	\$95,992	\$191,750	\$191,750	\$191,750	\$671,242
14	Operating Expense	\$10,616	\$21,231	\$21,231	\$21,231	\$74,309
15	<b>Subtotal</b>	<b>\$106,607</b>	<b>\$212,981</b>	<b>\$212,981</b>	<b>\$212,981</b>	<b>\$745,550</b>
16	Indirect Percentage (%)		1%	1%	1%	
17	Indirect Cost (Line 16 X Line 15)		\$233	\$233	\$233	\$699
18	Pass-through to Providers					
19	<b>Total Expenditures</b>	<b>\$106,607</b>	<b>\$213,214</b>	<b>\$213,214</b>	<b>\$213,214</b>	<b>\$746,249</b>
20	<b>HSA Revenues</b>					
21	General Fund	\$106,607	\$213,214	\$213,214	\$213,214	\$746,249
22	Federal Funds CFDA #93.044					
23						
24						
25						
26						
27						
28						
29	<b>TOTAL HSA REVENUES</b>	<b>\$106,607</b>	<b>\$213,214</b>	<b>\$213,214</b>	<b>\$213,214</b>	<b>\$746,249</b>
30	<b>Other Revenues</b>					
31						
32						
33						
34						
35						
36	Total Revenues					
37	Full Time Equivalent (FTE)	0.94	1.78	1.78	1.78	1.57
39	Prepared by:			Telephone No.:		
40	HSA-CO Review Signature:			_____		
41	HSA #1					



	A	B	C	D	E	F	G
	Appendix B, Page 3						
1							
2							
3							
4	Program Name: Legal Services to Older Adults FY21-24						
5	(Same as Line 9 on HSA #1)						
6							
7							
8							
9							
10							
11							
		TERM	1/1/21-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	TOTAL
12	Expenditure Category						
13	Rental of Property						
14	Utilities(Elec, Water, Gas, Phone, Garbage)						
15	Postage (Senior Newsletters)		\$2,287	\$6,861	\$6,861	\$6,861	\$22,870
16	Building Maintenance Supplies and Repair						
17	Printing and Reproduction (Senior Letters)		\$4,233	\$12,699	\$12,699	\$12,699	\$42,330
18	Insurance						
19	Staff Training						
20	Staff Travel-(Local & Out of Town)						
21	Rental of Equipment						
22							
23	CONSULTANTS						
24	design & translation fees (Senior newsletters)		\$480	\$1,671	\$1,671	\$1,671	\$5,493
25	Contractual services: translation, consultation...		\$3,616				\$3,616
26							
27	OTHER						
28	Legal and other dues						
29	Client costs						
30	Library/Legal/Research						
31							
32							
33	<b>TOTAL OPERATING:</b>		<b>\$10,616</b>	<b>\$21,231</b>	<b>\$21,231</b>	<b>\$21,231</b>	<b>\$74,309</b>
34	Library/Legal/Research						

**Operating Expense Detail**

**APPENDIX A**  
**API LEGAL OUTREACH**  
**LEGAL SERVICES FOR OLDER ADULTS**  
**January 1, 2021 – June 30, 2024**

**I. Purpose**

The purpose of this grant is to ensure the rights and entitlements of older adults by providing legal assistance.

**II. Definitions**

California State Bar	The State Bar of California is the regulatory agency for the State's lawyers, charged with admitting and disciplining attorneys.
CARBON	Contracts Administration, Reporting, and Billing Online System
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment
Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
Grantee	API Legal Outreach
HSA	Human Services Agency of City and County of San Francisco
Legal Assistance	Legal advice and representation provided by an attorney to older individuals with economic or social needs; and includes – (i) to the extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of an attorney; and (ii) counseling or representation by a nonlawyer where permitted by law. Direct legal assistance may be provided face-to-face, by telephone, or by electronic communication and includes, but is not limited to, advice and consultation, litigation, administrative



representation, brief services, preparing legal documents and pro se assistance.

LGBTQ+	An acronym/term used to refer to persons who self-identify as non-heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 100% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
OAA	Older Americans Act
OCP	Office of Community Partnerships
Older Adult	Person who is 60 years or older, used interchangeably with senior
Senior	Person who is 60 years or older, used interchangeably with older adult
SOGI	Sexual Orientation and Gender Identity; Ordinance No. 159-16 amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9).

### III. Target Population

According to the federal mandates of the Older Americans Act, services must target clients who are members of one or more of the following groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income

- Limited English proficiency
- Minority
- Frail
- Member of LGBTQ+ Community

**IV. Eligibility for Services**

- 1) A resident of San Francisco *and*
- 2) Aged 60 and above

**V. Location and Time of Services**

API Legal Outreach’s offices are located at 1121 Mission Street in San Francisco. Services are offered Monday through Friday during regular business hours.

**VI. Description of Services**

Legal service providers will help eligible clients with a variety of legal issues which may include benefit appeals, eviction prevention, consumer fraud/issues, elder abuse prevention, simple will preparation, disability planning and advance directives, debt collection issues, and immigration matters. Legal service providers will often work in conjunction with other service providers to carefully assess and triage client needs.

Clients seeking legal services will go through an initial screening process. Legal providers will then categorize the services they provide into one of the following four modules:

- 1) Information and Referral – the concern is more appropriately referred to another service for assistance
- 2) Advise and Close – the legal issue is very easily addressed, advice is provided and the case is closed
- 3) Brief Services – the client is in need of assistance to prepare legal correspondence, fill out an official form, review legal documents, etc.
- 4) Case Acceptance – the legal issue warrants more extensive legal representation and a case file is opened, e.g., elder abuse, consumer fraud, challenging eviction petitions, etc.

Grantee will be provided with a copy of the California Department of Aging’s California Statewide Guidance for Legal Assistance. Grantee is expected to use these Guidelines in the provision of OAA legal services. While non-binding, the Guidelines should be considered for guidance and technical assistance in the provision of services.

Areas of expertise for legal service Grantees should include at least one of the following:

- 1) Income/Nutrition: Supplemental Security Income (“SSI”), Social Security, pensions/retirement, CalFresh/Supplemental Nutrition Assistance Program (SNAP), unemployment
- 2) Housing/Utilities: Tenant rights, real property, utilities
- 3) Long-term Care: Skilled Nursing Facility (SNF) issues, community-based, long-term care services

- 4) Healthcare: MediCal, Medicare, managed care, provider/services access, private insurance
- 5) Protective Services/Elder Abuse/Defense against Conservatorship: Conservatorship issues with a focus on defending older persons against guardianship as called for in the OAA § 321(a)(6)), restraining orders, abuse/neglect, exploitation, advanced planning/autonomy/advance directives
- 6) Consumer: Bankruptcy/debt, contracts/warranties, scams/identity theft
- 7) Civil Rights: Limited English Proficient (LEP) rights, discrimination, immigration

Clients can expect that the legal service provider is experienced and knowledgeable about working with an older adult population. Grantee is expected to keep up with changes in the law that affect older adults, particularly in the issue areas in which services are provided. Grantee will further assure that services delivered are consistent with professional standards for this service. Grantee should be as culturally and linguistically competent as possible to serve an ethnically diverse population.

Legal services provided and to be reported under this grant will meet the definition of Legal Assistance as described in the Definitions section above. Legal Assistance will be recorded by number of hours of Legal Assistance provided.

Grantee agrees to meet on a quarterly basis or as needed with other legal service providers and the Office of Community Partnerships staff to help develop and maintain a comprehensive citywide approach to legal service programs funded by DAS.

Grantee will assign staff to help in the planning, development, and distribution of a quarterly legal services newspaper in conjunction with other DAS legal service providers. The newsletter will serve as an outreach and educational tool. Content will be printed in multiple languages and cover legal topics most relevant to the target population.

\*\*\*Grantee shall continue to follow guidance in or instructions from health care providers, the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments relating to COVID-19. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving services.

## VII. Service Objectives

For the period 1/1/21 – 6/30/21:

- Grantee will serve **40** unduplicated clients.
- Grantee will provide **1,350** units of service of Legal Assistance. A unit is one hour of Legal Assistance.

On an annual basis, starting July 1, 2021:

- Grantee will serve 80 unduplicated clients.
- Grantee will provide 2,700 units of service of Legal Assistance. A unit is one hour of Legal Assistance.

### **VIII. Outcome Objectives**

Grantees will participate in a quarterly reporting process designed by Office of Community Partnership (OCP) staff. Reporting on outcomes through this framework will demonstrate and measure the impact, outcomes, and results of legal services provided. Outcome measures originally developed by the State Bar of California serve as the basis for this reporting framework.

Collecting outcomes through this manner will allow DAS and Grantee to track positive outcomes in a particular contract year as well as comparing the outcomes from year to year. Results may help establish benchmarks for performance in future years.

Grantee will, on a quarterly basis, complete and submit to OCP a report on program performance which includes the following:

- Total clients served including aggregate demographic information
- Total hours of legal assistance provided.
- Total number of cases opened during the quarter
- Total number of cases closed during the quarter
- Categorization of level of service for each case closed during the quarter (Information and Referral, Advise and Close, Brief Service, Case Acceptance).
- Recording of each case closed into standardized categories based on legal issue assisted with (e.g. housing, income maintenance, consumer/finance).
- Categorization of each case closed within a series of standardized outcomes (e.g. obtained, preserved, or increased disability or age related benefit; prevented loss of current housing, etc.) as defined by the State Bar of California.
- Community education, outreach efforts, and client narratives

Completion of quarterly reporting will be done via an online portal developed and supported by OCP analyst staff. Reporting periods and deadlines will be as follows:

- 1st Quarter (covering July, August, September) due October 25<sup>th</sup> each year
- 2nd Quarter (covering October, November, December) due January 25<sup>th</sup> each year
- 3rd Quarter (covering January, February, March) due April 25<sup>th</sup> each year
- 4th Quarter (covering April, May, June) due July 25<sup>th</sup> each year

### **IX. Additional Reporting Requirements**

Grantee will provide various reports during the term of the grant agreement:

- A. The grantee will enter into the CA GetCare Service Unit section all Service Objectives by the 5th working day of the month for the preceding month.

- B. Monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system and include Service Objectives
- C. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report shall be submitted via the CARBON system.
- D. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10th (for July 1-December 31 data) and July 10th (for January 1-June 30 data)
- E. Grantee shall develop and deliver ad hoc reports as requested by DAS/HSA.
- F. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis; Grantee will maintain evidence of staff completion of this training.
- G. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.
- H. Pursuant to California Department of Aging requirement, Grantor reserves the right to reduce funding available for this contract in the event that actual costs are below funding levels initially budgeted for the delivery of services.
- I. Grantee will develop a Grievance Policy consistent with Office on the Aging Program Memorandum #33 - Consumer Grievance Policy.
- J. Through the Older Americans Act Area Plan development process, the City of San Francisco identifies "Focal Points" which are designed to help older adults and adults with disabilities connect to services throughout the City. These Focal Points are:

Designated Community Focal Point	Address
Western Addition Senior Center (BHPMSS)	1390 1/2 Turk St, San Francisco, 94115
Bayview Senior Connections (BHPMSS)	1753 Carroll Ave, San Francisco, CA 94124
OMI Senior Center (CCCYO)	65 Beverly St, San Francisco, 94132
Richmond Senior Center (GGSS)	6221 Geary Blvd, San Francisco, 94121
Mission Neighborhood Centers	362 Capp St, San Francisco, CA 94110
30th Street Senior Center (On Lok)	225 30th St, San Francisco, 94131
Openhouse Bob Ross LGBT Senior Center	65 Laguna St, San Francisco, CA 94102
Downtown SF Senior Center (NCPHS)	481 O'Farrell St, San Francisco, 94102
Aquatic Park Senior Center (SFSC)	890 Beach St, San Francisco, 94109
Self-Help for the Elderly	601 Jackson St, San Francisco, 94133
Geen Mun Activity Center (SHE)	777 Stockton St, San Francisco, 94108

South Sunset Activity Center (SHE)	2601 40th Ave, San Francisco, 94116
West Portal Clubhouse (SHE)	131 Lenox Way, San Francisco, 94127
Toolworks	25 Kearny St, San Francisco, 94108
Independent Living Resource Center San Francisco	825 Howard Street, San Francisco, CA 94103
DAS Benefits and Services Hub	2 Gough St, San Francisco, 94103

K. For assistance with reporting requirements, submission of reports, or other questions related to this grant please contact:

Ofelia Trevino  
Analyst, Office of Community Partnerships  
DAS  
P.O. Box 7988  
San Francisco, CA 94120-7988  
(415) 355-3571  
Ofelia.Trevino@sfgov.org  
and  
Steve Kim  
Contract Manager  
Human Services Agency  
PO Box 7988  
San Francisco, CA 94120-7988  
(415) 557-6335  
Steve.Kim@sfgov.org

**X. Monitoring Activities**

A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on CA-Getcare, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; evidence of provision of the California Department of Aging (CDA) Security Awareness training to staff; program operation, which includes a review of a written policies and procedures manual of all OCP-funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of directors list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool; translation and social services are based on staff hours.

B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of the Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, MOUs, the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	C	D	E	F
1	Appendix B, Page 1					
2	<b>HUMAN SERVICES AGENCY BUDGET SUMMARY</b> <b>1/1/21-6/30/24</b>					
3						
4						
5						
6	API Legal Outreach (dba of Nihonmachi Legal Outreach)		1/1/21-6/30/24			
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
8	Effective Date of Mod. No. of Mod.					
9	<b>Program: Legal Services for Older Adults</b>					
10	Budget Reference Page No.(s)					
11	Program Term	1/1/21-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	Total
12	<b>Expenditures</b>					
13	Salaries & Benefits	\$67,332	\$134,664	\$134,664	\$134,664	\$471,324
14	Operating Expenses	\$11,795	\$23,640	\$24,260	\$24,260	\$83,955
15	<b>Subtotal</b>	<b>\$79,127</b>	<b>\$158,304</b>	<b>\$158,924</b>	<b>\$158,924</b>	<b>\$555,279</b>
16	Indirect Percentage (%)	15%	15%	15%	15%	
17	Indirect Cost (Line 16 X Line 15)	\$11,852	\$23,654	\$23,034	\$23,034	\$81,574
18	Capital/Subcontractor Expenditures					
19	Total Expenditures	\$90,979	\$181,958	\$181,958	\$181,958	\$636,853
20	<b>HSA Revenues</b>					
21						
22	General Fund(ALLOC UNKNOWN)	\$90,979	\$181,958	\$181,958	\$181,958	\$636,853
23	CFDA 93.044 (ALLOC UNKNOWN)					
24						
25						
26						
27						
28						
29	<b>TOTAL HSA REVENUES</b>	<b>\$90,979</b>	<b>\$181,958</b>	<b>\$181,958</b>	<b>\$181,958</b>	<b>\$636,853</b>
30	<b>Other Revenues</b>					
31						
32						
33						
34						
35						
36	Total Revenues	\$90,979	\$181,958	\$181,958	\$181,958	\$636,853
37	Full Time Equivalent (FTE)	0.90	1.80	1.80	1.80	
39	Prepared by: Dean Ito Taylor/Lorraine Yos Telephone No.: 510-251-2846 x 140					10/2/2020
40	HSA-CO Review Signature: _____					8/27/2020
41	HSA #1					





	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Appendix B, Page 3												
2													
3													
4	Program: Legal Services for Older Adults												
5	(Same as Line 9 on HSA #1)												
6													
7													
8													
9													
10													
11													
12	TOTAL												
13				TERM	1/1/21-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24					
14	Expenditure Category												
15	Utilities(Elec, Water, Gas, Phone, Garbage, DSL)				\$1,540	\$3,080	\$3,080	\$3,080	\$3,080				\$10,780
16	Office Supplies, Postage				\$2,440	\$4,880	\$4,880	\$4,880	\$4,880				\$17,080
17	Building Maintenance Supplies and Repair				\$1,390	\$2,780	\$2,780	\$2,780	\$2,780				\$9,730
18	Insurance				\$1,125		\$1,520	\$1,520	\$1,520				\$4,165
19	<b>CONSULTANTS</b>												
20	Newsletter					\$4,000	\$4,000	\$4,000	\$4,000				\$12,000
21	Audit				\$1,200	\$2,400	\$2,400	\$2,400	\$2,400				\$8,400
22	<b>OTHER</b>												
23	Building Occupancy (mortgage)				\$2,800	\$5,600	\$5,600	\$5,600	\$5,600				\$19,600
24	Additional office and safety supplies due to covid				\$1,300	\$900							\$2,200
25													\$0
26	<b>TOTAL OPERATING EXPENSE</b>				<b>\$11,795</b>	<b>\$23,640</b>	<b>\$24,260</b>	<b>\$24,260</b>	<b>\$24,260</b>				<b>\$83,955</b>
27													
28	<b>HSA #3</b>												<b>8/27/2020</b>

## APPENDIX A

La Raza Centro Legal, Inc.

### LEGAL SERVICES FOR OLDER ADULTS

January 1, 2021 – June 30, 2024

#### I. Purpose

The purpose of this grant is to ensure the rights and entitlements of older adults by providing legal assistance.

#### II. Definitions

California State Bar The State Bar of California is the regulatory agency for the State's lawyers, charged with admitting and disciplining attorneys.

CARBON Contracts Administration, Reporting, and Billing Online System

DAS Department of Disability and Aging Services

Disability A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment

Frail An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or others.

Grantee La Raza Centro Legal, Inc.

HSA Human Services Agency of City and County of San Francisco

Legal Assistance Legal advice and representation provided by an attorney to older individuals with economic or social needs; and includes – (i) to the extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of an attorney;

and (ii) counseling or representation by a nonlawyer where permitted by law. Direct legal assistance may be provided face-to-face, by telephone, or by electronic communication and includes, but is not limited to, advice and consultation, litigation, administrative representation, brief services, preparing legal documents and pro se assistance.

LGBTQ+	An acronym/term used to refer to persons who self-identify as non-heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 100% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
OAA	Older Americans Act
OCP	Office of Community Partnerships
Older Adult	Person who is 60 years or older, used interchangeably with senior
Senior	Person who is 60 years or older, used interchangeably with older adult
SOGI	Sexual Orientation and Gender Identity; Ordinance No. 159-16 amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9).

### III. Target Population

According to the federal mandates of the Older Americans Act, services must target clients who are members of one or more of the following groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income
- Limited English proficiency
- Minority
- Frail
- Member of LGBTQ+ Community

### IV. Eligibility for Services

- 1) A resident of San Francisco *and*
- 2) Aged 60 and above

### V. Location and Time of Services

La Raza Centro Legal, Inc.'s offices are located at 474 Valencia St #295, San Francisco, CA 94103. Services are offered Monday through Friday during regular business hours.

### VI. Description of Services

Legal service providers will help eligible clients with a variety of legal issues which may include benefit appeals, eviction prevention, consumer fraud/issues, elder abuse prevention, simple will preparation, disability planning and advance directives, debt collection issues, and immigration matters. Legal service providers will often work in conjunction with other service providers to carefully assess and triage client needs.

Clients seeking legal services will go through an initial screening process. Legal providers will then categorize the services they provide into one of the following four modules:

- 1) Information and Referral – the concern is more appropriately referred to another service for assistance
- 2) Advise and Close – the legal issue is very easily addressed, advice is provided and the case is closed
- 3) Brief Services – the client is in need of assistance to prepare legal correspondence, fill out an official form, review legal documents, etc.
- 4) Case Acceptance – the legal issue warrants more extensive legal representation and a case file is opened, e.g., elder abuse, consumer fraud, challenging eviction petitions, etc.

Grantee will be provided with a copy of the California Department of Aging's California Statewide Guidance for Legal Assistance. Grantee is expected to use these Guidelines in the

provision of OAA legal services. While non-binding, the Guidelines should be considered for guidance and technical assistance in the provision of services.

Areas of expertise for legal service Grantees should include at least one of the following:

- 1) Income/Nutrition: Supplemental Security Income (“SSI”), Social Security, pensions/retirement, CalFresh/Supplemental Nutrition Assistance Program (SNAP), unemployment
- 2) Housing/Utilities: Tenant rights, real property, utilities
- 3) Long-term Care: Skilled Nursing Facility (SNF) issues, community-based, long-term care services
- 4) Healthcare: MediCal, Medicare, managed care, provider/services access, private insurance
- 5) Protective Services/Elder Abuse/Defense against Conservatorship: Conservatorship issues with a focus on defending older persons against guardianship as called for in the OAA § 321(a)(6)), restraining orders, abuse/neglect, exploitation, advanced planning/autonomy/advance directives
- 6) Consumer: Bankruptcy/debt, contracts/warranties, scams/identity theft
- 7) Civil Rights: Limited English Proficient (LEP) rights, discrimination, immigration

Clients can expect that the legal service provider is experienced and knowledgeable about working with an older adult population. Grantee is expected to keep up with changes in the law that affect older adults, particularly in the issue areas in which services are provided. Grantee will further assure that services delivered are consistent with professional standards for this service. Grantee should be as culturally and linguistically competent as possible to serve an ethnically diverse population.

Legal services provided and to be reported under this grant will meet the definition of Legal Assistance as described in the Definitions section above. Legal Assistance will be recorded by number of hours of Legal Assistance provided.

Grantee agrees to meet on a quarterly basis or as needed with other legal service providers and the Office of Community Partnerships staff to help develop and maintain a comprehensive citywide approach to legal service programs funded by DAS.

Grantee will assign staff to help in the planning, development, and distribution of a quarterly legal services newspaper in conjunction with other DAS legal service providers. The newsletter will serve as an outreach and educational tool. Content will be printed in multiple languages and cover legal topics most relevant to the target population.

\*\*\*Grantee shall continue to follow guidance in or instructions from health care providers, the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments relating to COVID-19. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving services.

## VII. Service Objectives

For the period 1/1/21 – 6/30/21:

- Grantee will serve 50 unduplicated clients.
- Grantee will provide 1050 units of service of Legal Assistance. A unit is one hour of Legal Assistance.

On an annual basis, starting July 1, 2021:

- Grantee will serve 100 unduplicated clients.
- Grantee will provide 2100 units of service of Legal Assistance. A unit is one hour of Legal Assistance.

## VIII. Outcome Objectives

Grantees will participate in a quarterly reporting process designed by Office of Community Partnership (OCP) staff. Reporting on outcomes through this framework will demonstrate and measure the impact, outcomes, and results of legal services provided. Outcome measures originally developed by the State Bar of California serve as the basis for this reporting framework.

Collecting outcomes through this manner will allow DAS and Grantee to track positive outcomes in a particular contract year as well as comparing the outcomes from year to year. Results may help establish benchmarks for performance in future years.

Grantee will, on a quarterly basis, complete and submit to OCP a report on program performance which includes the following:

- Total clients served including aggregate demographic information
- Total hours of legal assistance provided.
- Total number of cases opened during the quarter
- Total number of cases closed during the quarter
- Categorization of level of service for each case closed during the quarter (Information and Referral, Advise and Close, Brief Service, Case Acceptance).
- Recording of each case closed into standardized categories based on legal issue assisted with (e.g. housing, income maintenance, consumer/finance).
- Categorization of each case closed within a series of standardized outcomes (e.g. obtained, preserved, or increased disability or age related benefit; prevented loss of current housing, etc.) as defined by the State Bar of California.
- Community education, outreach efforts, and client narratives

Completion of quarterly reporting will be done via an online portal developed and supported by OCP analyst staff. Reporting periods and deadlines will be as follows:

- 1st Quarter (covering July, August, September) due October 25<sup>th</sup> each year
- 2nd Quarter (covering October, November, December) due January 25<sup>th</sup> each year
- 3rd Quarter (covering January, February, March) due April 25<sup>th</sup> each year
- 4th Quarter (covering April, May, June) due July 25<sup>th</sup> each year

## **IX. Additional Reporting Requirements**

Grantee will provide various reports during the term of the grant agreement:

- A. The grantee will enter into the CA GetCare Service Unit section all Service Objectives by the 5th working day of the month for the preceding month.
- B. Monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system and include Service Objectives
- C. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report shall be submitted via the CARBON system.
- D. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10th (for July 1-December 31 data) and July 10th (for January 1-June 30 data)
- E. Grantee shall develop and deliver ad hoc reports as requested by DAS/HSA.
- F. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis; Grantee will maintain evidence of staff completion of this training.
- G. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.
- H. Pursuant to California Department of Aging requirement, Grantor reserves the right to reduce funding available for this contract in the event that actual costs are below funding levels initially budgeted for the delivery of services.
- I. Grantee will develop a Grievance Policy consistent with Office on the Aging Program Memorandum #33 - Consumer Grievance Policy.
- J. Through the Older Americans Act Area Plan development process, the City of San Francisco identifies "Focal Points" which are designed to help older adults and



adults with disabilities connect to services throughout the City. These Focal Points are:

Designated Community Focal Point	Address
Western Addition Senior Center (BHPMSS)	1390 1/2 Turk St, San Francisco, 94115
Bayview Senior Connections (BHPMSS)	1753 Carroll Ave, San Francisco, CA 94124
OMI Senior Center (CCCYO)	65 Beverly St, San Francisco, 94132
Richmond Senior Center (GGSS)	6221 Geary Blvd, San Francisco, 94121
Mission Neighborhood Centers	362 Capp St, San Francisco, CA 94110
30th Street Senior Center (On Lok)	225 30th St, San Francisco, 94131
Openhouse Bob Ross LGBT Senior Center	65 Laguna St, San Francisco, CA 94102
Downtown SF Senior Center (NCPHS)	481 O'Farrell St, San Francisco, 94102
Aquatic Park Senior Center (SFSC)	890 Beach St, San Francisco, 94109
Self-Help for the Elderly	601 Jackson St, San Francisco, 94133
Geen Mun Activity Center (SHE)	777 Stockton St, San Francisco, 94108
South Sunset Activity Center (SHE)	2601 40th Ave, San Francisco, 94116
West Portal Clubhouse (SHE)	131 Lenox Way, San Francisco, 94127
Toolworks	25 Kearny St, San Francisco, 94108
Independent Living Resource Center San Francisco	825 Howard Street, San Francisco, CA 94103
DAS Benefits and Services Hub	2 Gough St, San Francisco, 94103

K. For assistance with reporting requirements, submission of reports, or other questions related to this grant please contact:

Ofelia Trevino  
 Program Analyst, Office of Community Partnerships  
 DAS  
 P.O. Box 7988  
 San Francisco, CA 94120-7988  
[Ofelia.Trevino@sfgov.org](mailto:Ofelia.Trevino@sfgov.org)

and

Tahir Shaikh  
 Contract Manager  
 Human Services Agency  
 PO Box 7988  
 San Francisco, CA 94120-7988  
 (415) 355-3607  
[Tahir.Shaikh@sfgov.org](mailto:Tahir.Shaikh@sfgov.org)

## **X. Monitoring Activities**

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on CA-Getcare, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; evidence of provision of the California Department of Aging (CDA) Security Awareness training to staff; program operation, which includes a review of a written policies and procedures manual of all OCP-funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of directors list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool; translation and social services are based on staff hours.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of the Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, MOUs, the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY  
BY PROGRAM**

	A	B	C	D	E	F
1						
2						
3						
4						
5	Name		Term			
6	Agency Name: La Raza Centro Legal		1/1/21-6/30/24			
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
8	If modification, Effective Date of Mod.		No. of Mod.			
9	Program: Legal Services-Older Adults					
10	Budget Reference Page No.(s)					Total
11	Program Term	1/1/21-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	1/1/21-6/30/24
12	<b>Expenditures</b>					
13	Salaries & Benefits	\$51,512	\$103,025	\$103,025	\$103,025	\$360,587
14	Operating Expenses	\$12,776	\$23,144	\$23,144	\$23,144	\$82,208
15	<b>Subtotal</b>	<b>\$64,288</b>	<b>\$126,169</b>	<b>\$126,169</b>	<b>\$126,169</b>	<b>\$442,795</b>
16	Indirect Percentage (%)	5%	7%	7%	7%	7%
17	Indirect Cost (Line 16 X Line 15)	\$3,212	\$8,831	\$8,831	\$8,831	\$29,705
18	Subcontractor/Capital Expenditures	\$0	\$0	\$0	\$0	\$0
19	<b>Total Expenditures</b>	<b>\$67,500</b>	<b>\$135,000</b>	<b>\$135,000</b>	<b>\$135,000</b>	<b>\$472,500</b>
20	<b>HSA Revenues</b>					
21	General Fund	\$67,500	\$135,000	\$135,000	\$135,000	\$472,500
22						
23						
24						
25						
26						
27						
28						
29	<b>TOTAL HSA REVENUES</b>	<b>\$67,500</b>	<b>\$135,000</b>	<b>\$135,000</b>	<b>\$135,000</b>	<b>\$472,500</b>
30	<b>Other Revenues</b>					
31						
32						
33						
34						
35						
36	<b>Total Revenues</b>	<b>\$67,500</b>	<b>\$135,000</b>	<b>\$135,000</b>	<b>\$135,000</b>	<b>\$472,500</b>
37	Full Time Equivalent (FTE)					
39	Prepared by: Shannon Jew		Telephone No.: (415) 553-3409			
40	HSA-CO Review Signature: _____					
41	HSA #1					



	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Agency Name: La Raza Centro Legal Program: Legal Services-Older Adults												
2	Appendix B, Page 3 Date: 11/6/2020												
3	<b>Operating Expense Detail</b>												
4	Expenditure Category	TERM	1/1/21-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	TOTAL						
5	Rental of Property		\$2,835	\$5,669	\$5,669	\$5,669	\$19,842						
6	Computer Hardware		\$227	\$454	\$454	\$454	\$1,589						
7	Office Supplies, Postage, Printing & Production		\$681	\$1,363	\$1,363	\$1,363	\$4,770						
8	Building Maintenance and Repair		\$285	\$568	\$568	\$568	\$1,989						
9	Dues, Memberships, & Subscriptions		\$384	\$398	\$398	\$398	\$1,578						
10	Insurance		\$1,909	\$2,818	\$2,818	\$2,818	\$10,363						
11	Telecommunications		\$1,060	\$2,113	\$2,113	\$2,113	\$7,399						
12	Travel & Meals		\$414	\$1,000	\$1,000	\$1,000	\$3,414						
13	Rental of Equipment		\$968	\$968	\$968	\$968	\$3,888						
14	<b>CONSULTANTS</b>												
15	Financial Consultant		\$2,840	\$5,680	\$5,680	\$5,680	\$19,880						
16	Janitorial		\$818	\$1,636	\$1,636	\$1,636	\$5,726						
17	IT Contractor		\$339	\$477	\$477	\$477	\$1,770						
18	<b>OTHER</b>												
19													
20													
21													
22													
23													
24													
25													
26													
27													
28													
29													
30													
31	<b>TOTAL OPERATING EXPENSE</b>		<u>\$12,776</u>	<u>\$23,144</u>	<u>\$23,144</u>	<u>\$23,144</u>	<u>\$82,208</u>						
32													
33	HSA #3												

**APPENDIX A**

**Legal Assistance to the Elderly**

**LEGAL SERVICES FOR OLDER ADULTS**

**January 1, 2021 – June 30, 2024**

**I. Purpose**

The purpose of this grant is to ensure the rights and entitlements of older adults by providing legal assistance.

**II. Definitions**

California State Bar	The State Bar of California is the regulatory agency for the State's lawyers, charged with admitting and disciplining attorneys.
CARBON	Contracts Administration, Reporting, and Billing Online System
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment
Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
Grantee	Legal Assistance to the Elderly
HSA	Human Services Agency of City and County of San Francisco
Legal Assistance	Legal advice and representation provided by an attorney to older individuals with economic or social needs; and includes – (i) to the extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of an attorney;

and (ii) counseling or representation by a nonlawyer where permitted by law. Direct legal assistance may be provided face-to-face, by telephone, or by electronic communication and includes, but is not limited to, advice and consultation, litigation, administrative representation, brief services, preparing legal documents and pro se assistance.

LGBTQ+	An acronym/term used to refer to persons who self-identify as non-heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 100% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
OAA	Older Americans Act
OCP	Office of Community Partnerships
Older Adult	Person who is 60 years or older, used interchangeably with senior
Senior	Person who is 60 years or older, used interchangeably with older adult
SOGI	Sexual Orientation and Gender Identity; Ordinance No. 159-16 amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9).

### III. Target Population

According to the federal mandates of the Older Americans Act, services must target clients who are members of one or more of the following groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income
- Limited English proficiency
- Minority
- Frail
- Member of LGBTQ+ Community

### IV. Eligibility for Services

- 1) A resident of San Francisco *and*
- 2) Aged 60 and above

### V. Location and Time of Services

Legal Assistance to the Elderly's offices are located at 1663 Mission Street, Suite 225. Services are offered Monday through Friday during regular business hours.

### VI. Description of Services

Legal service providers will help eligible clients with a variety of legal issues which may include benefit appeals, eviction prevention, consumer fraud/issues, elder abuse prevention, simple will preparation, disability planning and advance directives, debt collection issues, and immigration matters. Legal service providers will often work in conjunction with other service providers to carefully assess and triage client needs.

Clients seeking legal services will go through an initial screening process. Legal providers will then categorize the services they provide into one of the following four modules:

- 1) Information and Referral – the concern is more appropriately referred to another service for assistance
- 2) Advise and Close – the legal issue is very easily addressed, advice is provided and the case is closed
- 3) Brief Services – the client is in need of assistance to prepare legal correspondence, fill out an official form, review legal documents, etc.
- 4) Case Acceptance – the legal issue warrants more extensive legal representation and a case file is opened, e.g., elder abuse, consumer fraud, challenging eviction petitions, etc.

Grantee will be provided with a copy of the California Department of Aging's California Statewide Guidance for Legal Assistance. Grantee is expected to use these Guidelines in the



provision of OAA legal services. While non-binding, the Guidelines should be considered for guidance and technical assistance in the provision of services.

Areas of expertise for legal service Grantees should include at least one of the following:

- 1) Income/Nutrition: Supplemental Security Income (“SSI”), Social Security, pensions/retirement, CalFresh/Supplemental Nutrition Assistance Program (SNAP), unemployment
- 2) Housing/Utilities: Tenant rights, real property, utilities
- 3) Long-term Care: Skilled Nursing Facility (SNF) issues, community-based, long-term care services
- 4) Healthcare: MediCal, Medicare, managed care, provider/services access, private insurance
- 5) Protective Services/Elder Abuse/Defense against Conservatorship: Conservatorship issues with a focus on defending older persons against guardianship as called for in the OAA § 321(a)(6)), restraining orders, abuse/neglect, exploitation, advanced planning/autonomy/advance directives
- 6) Consumer: Bankruptcy/debt, contracts/warranties, scams/identity theft
- 7) Civil Rights: Limited English Proficient (LEP) rights, discrimination, immigration

Clients can expect that the legal service provider is experienced and knowledgeable about working with an older adult population. Grantee is expected to keep up with changes in the law that affect older adults, particularly in the issue areas in which services are provided. Grantee will further assure that services delivered are consistent with professional standards for this service. Grantee should be as culturally and linguistically competent as possible to serve an ethnically diverse population.

Legal services provided and to be reported under this grant will meet the definition of Legal Assistance as described in the Definitions section above. Legal Assistance will be recorded by number of hours of Legal Assistance provided.

Grantee agrees to meet on a quarterly basis or as needed with other legal service providers and the Office of Community Partnerships staff to help develop and maintain a comprehensive citywide approach to legal service programs funded by DAS.

Grantee will assign staff to help in the planning, development, and distribution of a quarterly legal services newspaper in conjunction with other DAS legal service providers. The newsletter will serve as an outreach and educational tool. Content will be printed in multiple languages and cover legal topics most relevant to the target population.

\*\*\*Grantee shall continue to follow guidance in or instructions from health care providers, the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments relating to COVID-19. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving services.

## VII. Service Objectives

For the period 1/1/21 – 6/30/21:

- Grantee will serve 425 unduplicated clients.
- Grantee will provide 6,173 units of service of Legal Assistance. A unit is one hour of Legal Assistance.

On an annual basis, starting July 1, 2021:

- Grantee will serve 850 unduplicated clients.
- Grantee will provide 12,345 units of service of Legal Assistance. A unit is one hour of Legal Assistance.

## VIII. Outcome Objectives

Grantees will participate in a quarterly reporting process designed by Office of Community Partnership (OCP) staff. Reporting on outcomes through this framework will demonstrate and measure the impact, outcomes, and results of legal services provided. Outcome measures originally developed by the State Bar of California serve as the basis for this reporting framework.

Collecting outcomes through this manner will allow DAS and Grantee to track positive outcomes in a particular contract year as well as comparing the outcomes from year to year. Results may help establish benchmarks for performance in future years.

Grantee will, on a quarterly basis, complete and submit to OCP a report on program performance which includes the following:

- Total clients served including aggregate demographic information
- Total hours of legal assistance provided.
- Total number of cases opened during the quarter
- Total number of cases closed during the quarter
- Categorization of level of service for each case closed during the quarter (Information and Referral, Advise and Close, Brief Service, Case Acceptance).
- Recording of each case closed into standardized categories based on legal issue assisted with (e.g. housing, income maintenance, consumer/finance).
- Categorization of each case closed within a series of standardized outcomes (e.g. obtained, preserved, or increased disability or age related benefit; prevented loss of current housing, etc.) as defined by the State Bar of California.
- Community education, outreach efforts, and client narratives

Completion of quarterly reporting will be done via an online portal developed and supported by OCP analyst staff. Reporting periods and deadlines will be as follows:

- 1st Quarter (covering July, August, September) due October 25<sup>th</sup> each year
- 2nd Quarter (covering October, November, December) due January 25<sup>th</sup> each year
- 3rd Quarter (covering January, February, March) due April 25<sup>th</sup> each year
- 4th Quarter (covering April, May, June) due July 25<sup>th</sup> each year

## **IX. Additional Reporting Requirements**

Grantee will provide various reports during the term of the grant agreement:

- A. The grantee will enter into the CA GetCare Service Unit section all Service Objectives by the 5th working day of the month for the preceding month.
- B. Monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system and include Service Objectives
- C. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report shall be submitted via the CARBON system.
- D. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10th (for July 1-December 31 data) and July 10th (for January 1-June 30 data)
- E. Grantee shall develop and deliver ad hoc reports as requested by DAS/HSA.
- F. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis; Grantee will maintain evidence of staff completion of this training.
- G. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.
- H. Pursuant to California Department of Aging requirement, Grantor reserves the right to reduce funding available for this contract in the event that actual costs are below funding levels initially budgeted for the delivery of services.
- I. Grantee will develop a Grievance Policy consistent with Office on the Aging Program Memorandum #33 - Consumer Grievance Policy.
- J. Through the Older Americans Act Area Plan development process, the City of San Francisco identifies "Focal Points" which are designed to help older adults and

adults with disabilities connect to services throughout the City. These Focal Points are:

Designated Community Focal Point	Address
Western Addition Senior Center (BHPMSS)	1390 1/2 Turk St, San Francisco, 94115
Bayview Senior Connections (BHPMSS)	1753 Carroll Ave, San Francisco, CA 94124
OMI Senior Center (CCCYO)	65 Beverly St, San Francisco, 94132
Richmond Senior Center (GGSS)	6221 Geary Blvd, San Francisco, 94121
Mission Neighborhood Centers	362 Capp St, San Francisco, CA 94110
30th Street Senior Center (On Lok)	225 30th St, San Francisco, 94131
Openhouse Bob Ross LGBT Senior Center	65 Laguna St, San Francisco, CA 94102
Downtown SF Senior Center (NCPHS)	481 O'Farrell St, San Francisco, 94102
Aquatic Park Senior Center (SFSC)	890 Beach St, San Francisco, 94109
Self-Help for the Elderly	601 Jackson St, San Francisco, 94133
Geen Mun Activity Center (SHE)	777 Stockton St, San Francisco, 94108
South Sunset Activity Center (SHE)	2601 40th Ave, San Francisco, 94116
West Portal Clubhouse (SHE)	131 Lenox Way, San Francisco, 94127
Toolworks	25 Kearny St, San Francisco, 94108
Independent Living Resource Center San Francisco	825 Howard Street, San Francisco, CA 94103
DAS Benefits and Services Hub	2 Gough St, San Francisco, 94103

K. For assistance with reporting requirements, submission of reports, or other questions related to this grant please contact:

Reanna Albert  
 Program Analyst, Office of Community Partnerships  
 DAS  
 P.O. Box 7988  
 San Francisco, CA 94120-7988  
[Reanna.Albert@sfgov.org](mailto:Reanna.Albert@sfgov.org)

and

Ella Lee  
 Contract Manager  
 Human Services Agency  
 PO Box 7988  
 San Francisco, CA 94120-7988  
 (415) 355-3607  
[Ella.Lee@sfgov.org](mailto:Ella.Lee@sfgov.org)

## **X. Monitoring Activities**

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on CA-Getcare, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; evidence of provision of the California Department of Aging (CDA) Security Awareness training to staff; program operation, which includes a review of a written policies and procedures manual of all OCP-funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of directors list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool; translation and social services are based on staff hours.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of the Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, MOUs, the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	E	H	K	N	O
1	Appendix B, Page 1					
2	Document Date:					
3	<b>HUMAN SERVICES AGENCY BUDGET SUMMARY</b>					
4	<b>BY PROGRAM</b>					
5						
6						
7	Name				Term	
8	Legal Assistance to the Elderly				Jan 2021 - Jun 2024	
9	(Check One) New <input type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
10	If modification, Effective Date of Mod. No. of Mod.					
11	<b>Program: Legal services for older adults</b>					
12	Budget Reference Page No.(s)					
13	Program Term	1/1/21 - 6/30/21	FY 21/22	FY 22/23	FY 23/24	Total
15						
16	<b>DAS Expenditures</b>					
17	Salaries & Benefits	\$248,930	\$497,859	\$495,679	\$493,448	\$1,735,916
18	Operating Expenses	\$47,754	\$95,509	\$97,689	\$99,920	\$340,872
19	<b>Subtotal</b>	<b>\$296,684</b>	<b>\$593,368</b>	<b>\$593,368</b>	<b>\$593,368</b>	<b>\$2,076,788</b>
20	Indirect Percentage (%)	15%	15%	15%	15%	15%
21	Indirect Cost	\$44,503	\$89,005	\$89,005	\$89,005	\$311,518
26	Capital Expenditure					
27	Sub-Contractor Expenditure					
28	<b>Total DAS Expenditures</b>	<b>\$341,187</b>	<b>\$682,373</b>	<b>\$682,373</b>	<b>\$682,373</b>	<b>\$2,388,306</b>
29						
30	<b>Non DAS Expenditures</b>					
31	Salaries & Benefits					
32	Operating Expenses					
33	<b>Subtotal</b>					
34	Capital/Subcontractor Expenditures					
35	Indirect Percentage (%)					
36	Indirect Cost					
37	<b>Total Non DAS Expenditures</b>					
38						
39	<b>TOTAL DAS AND NON DAS EXPEDITURES</b>	<b>\$341,187</b>	<b>\$682,373</b>	<b>\$682,373</b>	<b>\$682,373</b>	<b>\$2,388,306</b>
40						
41	<b>DAS Revenues</b>					
42	General Fund	\$240,746	\$481,491	\$481,491	\$481,491	\$1,685,219
43	Federal Fund	\$100,441	\$200,882	\$200,882	\$200,882	\$703,087
44						
45						
46						
47						
48						
49						
50	<b>Total DAS Revenue</b>	<b>\$341,187</b>	<b>\$682,373</b>	<b>\$682,373</b>	<b>\$682,373</b>	<b>\$2,388,306</b>
51						
52	<b>Non DAS Revenues</b>					
53						
54						
55						
56						
57						
58	<b>Total Non DAS Revenue</b>					
59	<b>TOTAL DAS AND NON DAS REVENUE</b>	<b>\$341,187</b>	<b>\$682,373</b>	<b>\$682,373</b>	<b>\$682,373</b>	<b>\$2,388,306</b>
60						
61	Full Time Equivalent (FTE)					
63	Prepared by:	Telephone No.:			Date: 5/10/18	
64	HSA-CO Review Signature: _____					
65						
66	HSA #1					10/25/2016



	A	B	C	D	I	J	O	P	U	V	AA	AC
1	Program: Legal services for older adults											Appendix B, Page 3
2	(Same as Line 11 on HSA #1)											Document Date:
3												
4												
5	<b>Operating Expense Detail</b>											
6												
7												
8												
9												
10	<b>DAS Operating Expenses</b>											
11	<b>Expenditure Category</b>											
12	Rental of Property		\$26,968		\$53,936		\$55,284		\$56,667		\$192,855	
13	Utilities (Elec, Water, Gas, Phone, Garbage)		\$2,588		\$5,176		\$5,280		\$5,385		\$18,429	
14	Office Supplies, Postage		\$5,534		\$11,068		\$11,412		\$11,464		\$39,478	
15	Building Maintenance Supplies and Repair											
16	Printing and Reproduction		\$767		\$1,533		\$1,564		\$1,595		\$5,459	
17	Insurance		\$4,373		\$8,745		\$8,920		\$9,098		\$31,136	
18	Staff Training		\$1,000		\$2,000		\$2,040		\$2,081		\$7,121	
19	Staff Travel-(Local & Out of Town)		\$247		\$493		\$503		\$513		\$1,756	
20	Rental of Equipment, Maintenance and repair		\$1,390		\$2,785		\$2,841		\$2,898		\$9,914	
21	Law Library Maintenance		\$2,379		\$4,657		\$4,657		\$4,657		\$16,350	
22	State Bar Dues		\$1,000		\$2,000		\$2,040		\$2,081		\$7,121	
23	Professional Memberships		\$482		\$963		\$982		\$1,002		\$3,429	
24	Volunteer Recognition		\$327		\$653		\$666		\$679		\$2,325	
25	Cloud-based services		\$500		\$1,000		\$1,000		\$1,000		\$3,500	
26	Client Litigation Costs		\$200		\$500		\$500		\$600		\$2,000	
27	Consultant											
28	Consultant A											
31	<b>Total DAS Operating Expenses</b>		\$47,754		\$95,509		\$97,689		\$99,920		\$340,872	
32												
33	<b>Non DAS Operating Expenses</b>											
34	<b>Expenditure Category</b>											
35	Rental of Property											
36	Utilities (Elec, Water, Gas, Phone, Garbage)											
37	Office Supplies, Postage											
38	Building Maintenance Supplies and Repair											
39	Printing and Reproduction											
40	Insurance											
41	Staff Training											
42	Staff Travel-(Local & Out of Town)											
43	Rental of Equipment											
47	Consultant											
48	Consultant A											
51	<b>Total Non DAS Operating Expenses</b>											
52												
53	<b>Total DAS and Non DAS Operating Expenses</b>		\$47,754		\$95,509		\$97,689		\$99,920		\$340,872	
54												
55	HSA #3											10/25/2016



**APPENDIX A**

**Open Door Legal**

**LEGAL SERVICES FOR OLDER ADULTS**

**January 1, 2021 – June 30, 2024**

**I. Purpose**

The purpose of this grant is to ensure the rights and entitlements of older adults by providing legal assistance.

**II. Definitions**

California State Bar The State Bar of California is the regulatory agency for the State's lawyers, charged with admitting and disciplining attorneys.

CARBON Contracts Administration, Reporting, and Billing Online System

DAS Department of Disability and Aging Services

Disability A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment

Frail An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or others.

Grantee Open Door Legal

HSA Human Services Agency of City and County of San Francisco

Legal Assistance Legal advice and representation provided by an attorney to older individuals with economic or social needs; and includes – (i) to the extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of an attorney;

and (ii) counseling or representation by a nonlawyer where permitted by law. Direct legal assistance may be provided face-to-face, by telephone, or by electronic communication and includes, but is not limited to, advice and consultation, litigation, administrative representation, brief services, preparing legal documents and pro se assistance.

LGBTQ+	An acronym/term used to refer to persons who self-identify as non-heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 100% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
OAA	Older Americans Act
OCP	Office of Community Partnerships
Older Adult	Person who is 60 years or older, used interchangeably with senior
Senior	Person who is 60 years or older, used interchangeably with older adult
SOGI	Sexual Orientation and Gender Identity; Ordinance No. 159-16 amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9).

### III. Target Population

According to the federal mandates of the Older Americans Act, services must target clients who are members of one or more of the following groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income
- Limited English proficiency
- Minority
- Frail
- Member of LGBTQ+ Community

### IV. Eligibility for Services

- 1) A resident of San Francisco *and*
- 2) Aged 60 and above

### V. Location and Time of Services

Open Door Legal's offices are located at 4634 3<sup>rd</sup> Street, 60 Ocean Avenue, and 1111 Buchanan Street. Services are offered Monday through Friday during regular business hours.

### VI. Description of Services

Legal service providers will help eligible clients with a variety of legal issues which may include benefit appeals, eviction prevention, consumer fraud/issues, elder abuse prevention, simple will preparation, disability planning and advance directives, debt collection issues, and immigration matters. Legal service providers will often work in conjunction with other service providers to carefully assess and triage client needs.

Clients seeking legal services will go through an initial screening process. Legal providers will then categorize the services they provide into one of the following four modules:

- 1) Information and Referral – the concern is more appropriately referred to another service for assistance
- 2) Advise and Close – the legal issue is very easily addressed, advice is provided and the case is closed
- 3) Brief Services – the client is in need of assistance to prepare legal correspondence, fill out an official form, review legal documents, etc.
- 4) Case Acceptance – the legal issue warrants more extensive legal representation and a case file is opened, e.g., elder abuse, consumer fraud, challenging eviction petitions, etc.

Grantee will be provided with a copy of the California Department of Aging's California Statewide Guidance for Legal Assistance. Grantee is expected to use these Guidelines in the

provision of OAA legal services. While non-binding, the Guidelines should be considered for guidance and technical assistance in the provision of services.

Areas of expertise for legal service Grantees should include at least one of the following:

- 1) Income/Nutrition: Supplemental Security Income (“SSI”), Social Security, pensions/retirement, CalFresh/Supplemental Nutrition Assistance Program (SNAP), unemployment
- 2) Housing/Utilities: Tenant rights, real property, utilities
- 3) Long-term Care: Skilled Nursing Facility (SNF) issues, community-based, long-term care services
- 4) Healthcare: MediCal, Medicare, managed care, provider/services access, private insurance
- 5) Protective Services/Elder Abuse/Defense against Conservatorship: Conservatorship issues with a focus on defending older persons against guardianship as called for in the OAA § 321(a)(6)), restraining orders, abuse/neglect, exploitation, advanced planning/autonomy/advance directives
- 6) Consumer: Bankruptcy/debt, contracts/warranties, scams/identity theft
- 7) Civil Rights: Limited English Proficient (LEP) rights, discrimination, immigration

Clients can expect that the legal service provider is experienced and knowledgeable about working with an older adult population. Grantee is expected to keep up with changes in the law that affect older adults, particularly in the issue areas in which services are provided. Grantee will further assure that services delivered are consistent with professional standards for this service. Grantee should be as culturally and linguistically competent as possible to serve an ethnically diverse population.

Legal services provided and to be reported under this grant will meet the definition of Legal Assistance as described in the Definitions section above. Legal Assistance will be recorded by number of hours of Legal Assistance provided.

Grantee agrees to meet on a quarterly basis or as needed with other legal service providers and the Office of Community Partnerships staff to help develop and maintain a comprehensive citywide approach to legal service programs funded by DAS.

Grantee will assign staff to help in the planning, development, and distribution of a quarterly legal services newspaper in conjunction with other DAS legal service providers. The newsletter will serve as an outreach and educational tool. Content will be printed in multiple languages and cover legal topics most relevant to the target population.

\*\*\*Grantee shall continue to follow guidance in or instructions from health care providers, the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments relating to COVID-19. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving services.

## VII. Service Objectives

For the period 1/1/21 – 6/30/21:

- Grantee will serve 29 unduplicated clients.
- Grantee will provide 800 units of service of Legal Assistance. A unit is one hour of Legal Assistance.

On an annual basis, starting July 1, 2021:

- Grantee will serve 58 unduplicated clients.
- Grantee will provide 1,600 units of service of Legal Assistance. A unit is one hour of Legal Assistance.

## VIII. Outcome Objectives

Grantees will participate in a quarterly reporting process designed by Office of Community Partnership (OCP) staff. Reporting on outcomes through this framework will demonstrate and measure the impact, outcomes, and results of legal services provided. Outcome measures originally developed by the State Bar of California serve as the basis for this reporting framework.

Collecting outcomes through this manner will allow DAS and Grantee to track positive outcomes in a particular contract year as well as comparing the outcomes from year to year. Results may help establish benchmarks for performance in future years.

Grantee will, on a quarterly basis, complete and submit to OCP a report on program performance which includes the following:

- Total clients served including aggregate demographic information
- Total hours of legal assistance provided.
- Total number of cases opened during the quarter
- Total number of cases closed during the quarter
- Categorization of level of service for each case closed during the quarter (Information and Referral, Advise and Close, Brief Service, Case Acceptance).
- Recording of each case closed into standardized categories based on legal issue assisted with (e.g. housing, income maintenance, consumer/finance).
- Categorization of each case closed within a series of standardized outcomes (e.g. obtained, preserved, or increased disability or age related benefit; prevented loss of current housing, etc.) as defined by the State Bar of California.
- Community education, outreach efforts, and client narratives

Completion of quarterly reporting will be done via an online portal developed and supported by OCP analyst staff. Reporting periods and deadlines will be as follows:

- 1st Quarter (covering July, August, September) due October 25<sup>th</sup> each year
- 2nd Quarter (covering October, November, December) due January 25<sup>th</sup> each year
- 3rd Quarter (covering January, February, March) due April 25<sup>th</sup> each year
- 4th Quarter (covering April, May, June) due July 25<sup>th</sup> each year

## **IX. Additional Reporting Requirements**

Grantee will provide various reports during the term of the grant agreement:

- A. The grantee will enter into the CA GetCare Service Unit section all Service Objectives by the 5th working day of the month for the preceding month.
- B. Monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system and include Service Objectives
- C. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report shall be submitted via the CARBON system.
- D. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10th (for July 1-December 31 data) and July 10th (for January 1-June 30 data)
- E. Grantee shall develop and deliver ad hoc reports as requested by DAS/HSA.
- F. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis; Grantee will maintain evidence of staff completion of this training.
- G. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.
- H. Pursuant to California Department of Aging requirement, Grantor reserves the right to reduce funding available for this contract in the event that actual costs are below funding levels initially budgeted for the delivery of services.
- I. Grantee will develop a Grievance Policy consistent with Office on the Aging Program Memorandum #33 - Consumer Grievance Policy.
- J. Through the Older Americans Act Area Plan development process, the City of San Francisco identifies "Focal Points" which are designed to help older adults and

adults with disabilities connect to services throughout the City. These Focal Points are:

Designated Community Focal Point	Address
Western Addition Senior Center (BHPMSS)	1390 1/2 Turk St, San Francisco, 94115
Bayview Senior Connections (BHPMSS)	1753 Carroll Ave, San Francisco, CA 94124
OMI Senior Center (CCCYO)	65 Beverly St, San Francisco, 94132
Richmond Senior Center (GGSS)	6221 Geary Blvd, San Francisco, 94121
Mission Neighborhood Centers	362 Capp St, San Francisco, CA 94110
30th Street Senior Center (On Lok)	225 30th St, San Francisco, 94131
Openhouse Bob Ross LGBT Senior Center	65 Laguna St, San Francisco, CA 94102
Downtown SF Senior Center (NCPHS)	481 O'Farrell St, San Francisco, 94102
Aquatic Park Senior Center (SFSC)	890 Beach St, San Francisco, 94109
Self-Help for the Elderly	601 Jackson St, San Francisco, 94133
Geen Mun Activity Center (SHE)	777 Stockton St, San Francisco, 94108
South Sunset Activity Center (SHE)	2601 40th Ave, San Francisco, 94116
West Portal Clubhouse (SHE)	131 Lenox Way, San Francisco, 94127
Toolworks	25 Kearny St, San Francisco, 94108
Independent Living Resource Center San Francisco	825 Howard Street, San Francisco, CA 94103
DAS Benefits and Services Hub	2 Gough St, San Francisco, 94103

K. For assistance with reporting requirements, submission of reports, or other questions related to this grant please contact:

Reanna Albert  
 Program Analyst, Office of Community Partnerships  
 DAS  
 P.O. Box 7988  
 San Francisco, CA 94120-7988  
[reanna.albert@sfgov.org](mailto:reanna.albert@sfgov.org)

and

Ella Lee  
 Contract Manager  
 Human Services Agency  
 PO Box 7988  
 San Francisco, CA 94120-7988  
 (415) 355-3607  
[ella.lee@sfgov.org](mailto:ella.lee@sfgov.org)

## **X. Monitoring Activities**

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on CA-Getcare, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; evidence of provision of the California Department of Aging (CDA) Security Awareness training to staff; program operation, which includes a review of a written policies and procedures manual of all OCP-funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of directors list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool; translation and social services are based on staff hours.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of the Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, MOUs, the current board roster and selected board minutes for compliance with the Sunshine Ordinance.



**HUMAN SERVICES AGENCY BUDGET SUMMARY  
 BY PROGRAM**

	A	E	H	K	N	O
1						
2						
3						
4						
5						
6						
7	Name				Term	
8	Open Door Legal				Jan 2021 - Jun 2024	
9	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
10	If modification, Effective Date of Mod. _____ No. of Mod. _____					
11	Program: Legal services for older adults					
12	Budget Reference Page No.(s)					
13	Program Term	1/1/21 - 6/30/21	FY 21/22	FY 22/23	FY 23/24	Total
15						
16	<b>DAS Expenditures</b>					
17	Salaries & Benefits	\$48,001	\$96,001	\$96,001	\$96,001	\$336,004
18	Operating Expenses	\$15,497	\$30,995	\$30,995	\$30,995	\$108,482
19	<b>Subtotal</b>	<b>\$63,498</b>	<b>\$126,996</b>	<b>\$126,996</b>	<b>\$126,996</b>	<b>\$444,486</b>
20	Indirect Percentage (%)	10.00%	10.00%	10.00%	10.00%	10.00%
21	Indirect Cost	\$6,350	\$12,700	\$12,700	\$12,700	\$44,450
26	Capital Expenditure					
27	Sub-Contractor Expenditure					
28	<b>Total DAS Expenditures</b>	<b>\$69,848</b>	<b>\$139,696</b>	<b>\$139,696</b>	<b>\$139,696</b>	<b>\$488,936</b>
29						
30						
31	<b>DAS Revenues</b>					
32	General Fund	\$69,848	\$139,696	\$139,696	\$139,696	\$488,936
33						
34						
35						
36						
37						
38						
39						
40	<b>Total DAS Revenue</b>	<b>\$69,848</b>	<b>\$139,696</b>	<b>\$139,696</b>	<b>\$139,696</b>	<b>\$488,936</b>
41						
42	<b>Non DAS Revenues</b>					
43						
44						
45						
46						
47						
48	<b>Total Non DAS Revenue</b>					
49	<b>TOTAL DAS AND NON DAS REVENUE</b>	<b>\$69,848</b>	<b>\$139,696</b>	<b>\$139,696</b>	<b>\$139,696</b>	<b>\$488,936</b>
50						
51	Full Time Equivalent (FTE)					
53	Prepared by:	Rachel Mellby	Telephone No.:	415-851-0314	Date: 11/2/2020	
54	HSA-CO Review Signature: _____					
55						
56	HSA #1					Date: 11/2/2020

		A	B	C	D	E	H	K	N	Q	R				
		Appendix B, Page 2 Document Date: December 2020													
		Program: Legal services for older adults													
		(Same as Line 11 on HSA #1)													
		Salaries & Benefits Detail													
		Agency Totals		HSA Program		1/1/21 - 6/30/21		FY 21/22		FY 22/23		FY 23/24		Total	
		Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budget	Budget	Budget	Budget	Budget	Budget	Budget	Budget	Budget	Budget
8	DAS Salary	\$84,000	0.48	50.00%	0.23	\$9,660	\$19,320	\$19,320	\$19,320	\$19,320	\$19,320	\$19,320	\$19,320	\$19,320	\$67,620
9	Lead Elder Law Attorney - Sil Liapis	\$77,000	0.46	50.00%	0.23	\$8,855	\$17,710	\$17,710	\$17,710	\$17,710	\$17,710	\$17,710	\$17,710	\$17,710	\$61,985
10	Elder Law Attorney - Kevin Buggy	\$81,500	0.34	50.00%	0.17	\$6,928	\$13,855	\$13,855	\$13,855	\$13,855	\$13,855	\$13,855	\$13,855	\$13,855	\$48,493
11	Consumer Attorney - Philip Green	\$96,000	0.15	50.00%	0.08	\$3,225	\$6,450	\$6,450	\$6,450	\$6,450	\$6,450	\$6,450	\$6,450	\$6,450	\$22,575
12	Senior Staff Attorney - Tara Macomber	\$61,100	0.14	50.00%	0.07	\$2,839	\$5,677	\$5,677	\$5,677	\$5,677	\$5,677	\$5,677	\$5,677	\$5,677	\$19,870
13	Lead Employment Attorney - Lindsey Pace	\$77,000	0.11	50.00%	0.06	\$2,118	\$4,235	\$4,235	\$4,235	\$4,235	\$4,235	\$4,235	\$4,235	\$4,235	\$14,823
14	Staff Housing Attorney - Devin Fathi	\$62,500	0.10	50.00%	0.05	\$1,563	\$3,125	\$3,125	\$3,125	\$3,125	\$3,125	\$3,125	\$3,125	\$3,125	\$10,938
15	Employment & Civil Litigation Paralegal - Brenda Falcon Ramos	\$62,500	0.10	50.00%	0.05	\$1,563	\$3,125	\$3,125	\$3,125	\$3,125	\$3,125	\$3,125	\$3,125	\$3,125	\$10,938
16	Immigration/Elder Law Paralegal - Jenny Salas	\$81,500	0.09	50.00%	0.05	\$1,834	\$3,668	\$3,668	\$3,668	\$3,668	\$3,668	\$3,668	\$3,668	\$3,668	\$12,838
17	Housing Attorney - Alex Lemberg	\$87,000	0.05	50.00%	0.03	\$1,088	\$2,175	\$2,175	\$2,175	\$2,175	\$2,175	\$2,175	\$2,175	\$2,175	\$7,613
18	Sr. Housing Attorney - TBH	\$69,792	0.90	0.00%	0.00										
19	Allocated Shared salaries (7.2 FTEs, total \$502,500)														
20															
21															
22															
23	Totals	\$849,692	2.90	500.00%	1.00	\$39,670	\$79,340	\$79,340	\$79,340	\$79,340	\$79,340	\$79,340	\$79,340	\$79,340	\$277,690
24															
25	Fringe Benefits Rate	21.00%													
26	Employee Fringe Benefits	\$178,477				\$8,331	\$16,661	\$16,661	\$16,661	\$16,661	\$16,661	\$16,661	\$16,661	\$16,661	\$58,314
27	Total DAS Salaries and Benefits	\$1,028,369				\$48,001	\$96,001	\$96,001	\$96,001	\$96,001	\$96,001	\$96,001	\$96,001	\$96,001	\$336,004
28															
29	HSA #2														

Date: 11/2/2020

	A	B	C	D	I	J	O	P	U	V	AA	AI	AC
1	Program: Legal services for older adults												
2	(Same as Line 11 on HSA #1)												
3													
4													
5													
6													
7													
9													
10	<b>DAS Operating Expenses</b>												
11	<u>Expenditure Category</u>												
12					\$3,290		6,580.00		6,580.00		6,580.00		\$23,030
13					\$1,246		2,492.00		2,492.00		2,492.00		\$8,722
14					\$165		331.00		331.00		331.00		\$1,158
15													
16					\$257		514.00		514.00		514.00		\$1,799
17					\$6,357		12,714.00		12,714.00		12,714.00		\$44,499
18					\$951		1,901.00		1,901.00		1,901.00		\$6,654
19					\$103		207.00		207.00		207.00		\$724
20					\$110		220.00		220.00		220.00		\$770
21					\$788		1,575.00		1,575.00		1,575.00		\$5,513
22					\$1,168		2,336.00		2,336.00		2,336.00		\$8,176
23					\$1,007		2,015.00		2,015.00		2,015.00		\$7,052
24					\$55		110.00		110.00		110.00		\$385
25													
26													
27													
28													
29													
30					\$15,497		\$30,995		\$30,995		\$30,995		\$108,482
31													
32													

**Operating Expense Detail**

1/1/21 - 6/30/21      FY 21/22      FY 22/23      FY 23/24      Total

Date: 11/2/2020

## APPENDIX A

### UC Hastings College of the Law

#### LEGAL SERVICES FOR OLDER ADULTS

January 1, 2021 – June 30, 2024

#### I. Purpose

The purpose of this grant is to ensure the rights and entitlements of older adults by providing legal assistance.

#### II. Definitions

California State Bar The State Bar of California is the regulatory agency for the State's lawyers, charged with admitting and disciplining attorneys.

CARBON Contracts Administration, Reporting, and Billing Online System

DAS Department of Disability and Aging Services

Disability A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment

Frail An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or others.

Grantee UC Hastings College of the Law

HSA Human Services Agency of City and County of San Francisco

Legal Assistance Legal advice and representation provided by an attorney to older individuals with economic or social needs; and includes – (i) to the extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of an attorney;

and (ii) counseling or representation by a nonlawyer where permitted by law. Direct legal assistance may be provided face-to-face, by telephone, or by electronic communication and includes, but is not limited to, advice and consultation, litigation, administrative representation, brief services, preparing legal documents and pro se assistance.

LGBTQ+	An acronym/term used to refer to persons who self-identify as non-heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 100% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
OAA	Older Americans Act
OCP	Office of Community Partnerships
Older Adult	Person who is 60 years or older, used interchangeably with senior
Senior	Person who is 60 years or older, used interchangeably with older adult
SOGI	Sexual Orientation and Gender Identity; Ordinance No. 159-16 amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9).

### III. Target Population

According to the federal mandates of the Older Americans Act, services must target clients who are members of one or more of the following groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income
- Limited English proficiency
- Minority
- Frail
- Member of LGBTQ+ Community

### IV. Eligibility for Services

- 1) A resident of San Francisco *and*
- 2) Aged 60 and above

### V. Location and Time of Services

UC Hastings College of the Law – Medical Legal Partnership for Seniors’ administrative offices are located at 200 McAllister Street. Services are offered Monday through Friday during regular business hours. Services are delivered via legal clinics at select hospitals and health clinics as well as home-visits throughout the City.

### VI. Description of Services

Legal service providers will help eligible clients with a variety of legal issues which may include benefit appeals, eviction prevention, consumer fraud/issues, elder abuse prevention, simple will preparation, disability planning and advance directives, debt collection issues, and immigration matters. Legal service providers will often work in conjunction with other service providers to carefully assess and triage client needs.

Clients seeking legal services will go through an initial screening process. Legal providers will then categorize the services they provide into one of the following four modules:

- 1) Information and Referral – the concern is more appropriately referred to another service for assistance
- 2) Advise and Close – the legal issue is very easily addressed, advice is provided and the case is closed
- 3) Brief Services – the client is in need of assistance to prepare legal correspondence, fill out an official form, review legal documents, etc.
- 4) Case Acceptance – the legal issue warrants more extensive legal representation and a case file is opened, e.g., elder abuse, consumer fraud, challenging eviction petitions, etc.

Grantee will be provided with a copy of the California Department of Aging's California Statewide Guidance for Legal Assistance. Grantee is expected to use these Guidelines in the provision of OAA legal services. While non-binding, the Guidelines should be considered for guidance and technical assistance in the provision of services.

Areas of expertise for legal service Grantees should include at least one of the following:

- 1) Income/Nutrition: Supplemental Security Income ("SSI"), Social Security, pensions/retirement, CalFresh/Supplemental Nutrition Assistance Program (SNAP), unemployment
- 2) Housing/Utilities: Tenant rights, real property, utilities
- 3) Long-term Care: Skilled Nursing Facility (SNF) issues, community-based, long-term care services
- 4) Healthcare: MediCal, Medicare, managed care, provider/services access, private insurance
- 5) Protective Services/Elder Abuse/Defense against Conservatorship: Conservatorship issues with a focus on defending older persons against guardianship as called for in the OAA § 321(a)(6)), restraining orders, abuse/neglect, exploitation, advanced planning/autonomy/advance directives
- 6) Consumer: Bankruptcy/debt, contracts/warranties, scams/identity theft
- 7) Civil Rights: Limited English Proficient (LEP) rights, discrimination, immigration

Clients can expect that the legal service provider is experienced and knowledgeable about working with an older adult population. Grantee is expected to keep up with changes in the law that affect older adults, particularly in the issue areas in which services are provided. Grantee will further assure that services delivered are consistent with professional standards for this service. Grantee should be as culturally and linguistically competent as possible to serve an ethnically diverse population.

Legal services provided and to be reported under this grant will meet the definition of Legal Assistance as described in the Definitions section above. Legal Assistance will be recorded by number of hours of Legal Assistance provided.

Grantee agrees to meet on a quarterly basis or as needed with other legal service providers and the Office of Community Partnerships staff to help develop and maintain a comprehensive citywide approach to legal service programs funded by DAS.

Grantee will assign staff to help in the planning, development, and distribution of a quarterly legal services newspaper in conjunction with other DAS legal service providers. The newsletter will serve as an outreach and educational tool. Content will be printed in multiple languages and cover legal topics most relevant to the target population.

\*\*\*Grantee shall continue to follow guidance in or instructions from health care providers, the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments relating to COVID-19. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements.

These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving services.

## VII. Service Objectives

For the period 1/1/21 – 6/30/21:

- Grantee will serve 75 unduplicated clients.
- Grantee will provide 937 units of service of Legal Assistance. A unit is one hour of Legal Assistance.

On an annual basis, starting July 1, 2021:

- Grantee will serve 150 unduplicated clients.
- Grantee will provide 1,875 units of service of Legal Assistance. A unit is one hour of Legal Assistance.

## VIII. Outcome Objectives

Grantees will participate in a quarterly reporting process designed by Office of Community Partnership (OCP) staff. Reporting on outcomes through this framework will demonstrate and measure the impact, outcomes, and results of legal services provided. Outcome measures originally developed by the State Bar of California serve as the basis for this reporting framework.

Collecting outcomes through this manner will allow DAS and Grantee to track positive outcomes in a particular contract year as well as comparing the outcomes from year to year. Results may help establish benchmarks for performance in future years.

Grantee will, on a quarterly basis, complete and submit to OCP a report on program performance which includes the following:

- Total clients served including aggregate demographic information
- Total hours of legal assistance provided.
- Total number of cases opened during the quarter
- Total number of cases closed during the quarter
- Categorization of level of service for each case closed during the quarter (Information and Referral, Advise and Close, Brief Service, Case Acceptance).
- Recording of each case closed into standardized categories based on legal issue assisted with (e.g. housing, income maintenance, consumer/finance).
- Categorization of each case closed within a series of standardized outcomes (e.g. obtained, preserved, or increased disability or age related benefit; prevented loss of current housing, etc.) as defined by the State Bar of California.



- Community education, outreach efforts, and client narratives

Completion of quarterly reporting will be done via an online portal developed and supported by OCP analyst staff. Reporting periods and deadlines will be as follows:

- 1st Quarter (covering July, August, September) due October 25<sup>th</sup> each year
- 2nd Quarter (covering October, November, December) due January 25<sup>th</sup> each year
- 3rd Quarter (covering January, February, March) due April 25<sup>th</sup> each year
- 4th Quarter (covering April, May, June) due July 25<sup>th</sup> each year

## **IX. Additional Reporting Requirements**

Grantee will provide various reports during the term of the grant agreement:

- A. The grantee will enter into the CA GetCare Service Unit section all Service Objectives by the 5th working day of the month for the preceding month.
- B. Monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system and include Service Objectives
- C. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report shall be submitted via the CARBON system.
- D. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10th (for July 1-December 31 data) and July 10th (for January 1-June 30 data)
- E. Grantee shall develop and deliver ad hoc reports as requested by DAS/HSA.
- F. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis; Grantee will maintain evidence of staff completion of this training.
- G. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.
- H. Pursuant to California Department of Aging requirement, Grantor reserves the right to reduce funding available for this contract in the event that actual costs are below funding levels initially budgeted for the delivery of services.
- I. Grantee will develop a Grievance Policy consistent with Office on the Aging Program Memorandum #33 - Consumer Grievance Policy.
- J. Through the Older Americans Act Area Plan development process, the City of San Francisco identifies "Focal Points" which are designed to help older adults and

adults with disabilities connect to services throughout the City. These Focal Points are:

Designated Community Focal Point	Address
Western Addition Senior Center (BHPMSS)	1390 1/2 Turk St, San Francisco, 94115
Bayview Senior Connections (BHPMSS)	1753 Carroll Ave, San Francisco, CA 94124
OMI Senior Center (CCCYO)	65 Beverly St, San Francisco, 94132
Richmond Senior Center (GGSS)	6221 Geary Blvd, San Francisco, 94121
Mission Neighborhood Centers	362 Capp St, San Francisco, CA 94110
30th Street Senior Center (On Lok)	225 30th St, San Francisco, 94131
Openhouse Bob Ross LGBT Senior Center	65 Laguna St, San Francisco, CA 94102
Downtown SF Senior Center (NCPHS)	481 O'Farrell St, San Francisco, 94102
Aquatic Park Senior Center (SFSC)	890 Beach St, San Francisco, 94109
Self-Help for the Elderly	601 Jackson St, San Francisco, 94133
Geen Mun Activity Center (SHE)	777 Stockton St, San Francisco, 94108
South Sunset Activity Center (SHE)	2601 40th Ave, San Francisco, 94116
West Portal Clubhouse (SHE)	131 Lenox Way, San Francisco, 94127
Toolworks	25 Kearny St, San Francisco, 94108
Independent Living Resource Center San Francisco	825 Howard Street, San Francisco, CA 94103
DAS Benefits and Services Hub	2 Gough St, San Francisco, 94103

K. For assistance with reporting requirements, submission of reports, or other questions related to this grant please contact:

Reanna Albert  
 Program Analyst, Office of Community Partnerships  
 DAS  
 P.O. Box 7988  
 San Francisco, CA 94120-7988  
[reanna.albert@sfgov.org](mailto:reanna.albert@sfgov.org)

and

Ella Lee  
 Contract Manager  
 Human Services Agency  
 PO Box 7988  
 San Francisco, CA 94120-7988  
 (415) 355-3607  
[ella.lee@sfgov.org](mailto:ella.lee@sfgov.org)

## **X. Monitoring Activities**

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on CA-Getcare, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; evidence of provision of the California Department of Aging (CDA) Security Awareness training to staff; program operation, which includes a review of a written policies and procedures manual of all OCP-funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of directors list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool; translation and social services are based on staff hours.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of the Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, MOUs, the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	E	H	K	N	O
1	Appendix B, Page 1					
2	Document Date: December 2020					
3	<b>HUMAN SERVICES AGENCY BUDGET SUMMARY</b>					
4	<b>BY PROGRAM</b>					
5						
6						
7	Name				Term	
8	UC Hastings College of the Law				Jan 2021 - Jun 2024	
9	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
10	If modification, Effective Date of Mod. _____ No. of Mod. _____					
11	<b>Program: Legal services for older adults</b>					
12	Budget Reference Page No.(s)					
13	Program Term	1/1/21 - 6/30/21	FY 21/22	FY 22/23	FY 23/24	Total
15	<b>DAS Expenditures</b>					
16						
17	Salaries & Benefits	\$64,488	\$128,975	\$128,975	\$128,975	\$451,413
18	Operating Expenses	\$4,389	\$8,779	\$8,779	\$8,779	\$30,726
19	<b>Subtotal</b>	<b>\$68,877</b>	<b>\$137,754</b>	<b>\$137,754</b>	<b>\$137,754</b>	<b>\$482,139</b>
20	Indirect Percentage (%) (max 12%)	12.00%	12.00%	12.00%	12.00%	12.00%
21	Indirect Cost	\$8,265	\$16,530	\$16,530	\$16,530	\$57,855
26	Capital Expenditure					
27	Sub-Contractor Expenditure					
28	<b>Total DAS Expenditures</b>	<b>\$77,142</b>	<b>\$154,284</b>	<b>\$154,284</b>	<b>\$154,284</b>	<b>\$539,994</b>
29	<b>Non DAS Expenditures</b>					
30	Salaries & Benefits	\$23,144	\$34,544	\$34,544	\$34,544	\$126,776
31	Operating Expenses					
32	<b>Subtotal</b>	<b>\$23,144</b>	<b>\$34,544</b>	<b>\$34,544</b>	<b>\$34,544</b>	<b>\$126,776</b>
33	Indirect Percentage (%)					
34	Indirect Cost (Line 33 X Line 34)					
35	Capital Expenditure					
36	Sub-Contractor Expenditure					
37	<b>Total Non DAS Expenditures</b>	<b>\$23,144</b>	<b>\$34,544</b>	<b>\$34,544</b>	<b>\$34,544</b>	<b>\$126,776</b>
38						
39	<b>Total DAS &amp; Non Expenditures</b>	<b>\$100,286</b>	<b>\$188,828</b>	<b>\$188,828</b>	<b>\$188,828</b>	<b>\$666,770</b>
40						
41						
42	<b>DAS Revenues</b>					
43	General Fund	\$77,142	\$154,284	\$154,284	\$154,284	\$539,994
44						
45						
46						
47						
48						
49						
50						
51	<b>Total DAS Revenue</b>	<b>\$77,142</b>	<b>\$154,284</b>	<b>\$154,284</b>	<b>\$154,284</b>	<b>\$539,994</b>
52						
53	<b>Non DAS Revenues</b>					
54						
55	UC Hastings- In Kind	\$10,472	\$27,744	\$27,744	\$27,744	\$93,704
56	UCSF- Grant Subcontracts to UC Hastings	\$6,800	\$6,800	\$6,800	\$6,800	\$27,200
57						
58						
59	<b>Total Non DAS Revenue</b>	<b>\$17,272</b>	<b>\$34,544</b>	<b>\$34,544</b>	<b>\$34,544</b>	<b>\$120,904</b>
60	<b>TOTAL DAS AND NON DAS REVENUE</b>	<b>\$94,414</b>	<b>\$188,828</b>	<b>\$188,828</b>	<b>\$188,828</b>	<b>\$660,898</b>
61						
62	Full Time Equivalent (FTE)					
64	Prepared by:	Telephone No.:			Date:	
65	HSA-CO Review Signature:	_____				
66						
67	HSA #1	10/22/2020				



	A	B	C	DF	G	J/L	M	P	S	T	Y	A	AC
1	Program: Legal services for older adults												
2	(Same as Line 11 on HSA #1)												
3													
4													
5													
6													
7													
9													
10	<b>DAS Operating Expenses</b>												
11	Expenditure Category												
12	Rental of Property												
13	Utilities (Elec, Water, Gas, Phone, Garbage)												
14				\$1,265			\$2,531		\$2,531		\$2,531		\$8,858
15	Building Maintenance Supplies and Repair												
16				\$422			\$1,412		\$1,412		\$1,412		\$4,658
17				\$562			\$926		\$926		\$926		\$3,340
18				\$60			\$1,280		\$1,280		\$1,280		\$3,900
19				\$1,000			\$1,550		\$1,550		\$1,550		\$5,650
20	Rental of Equipment												
21													
22	Consultant												
23	Consultant A												
24													
25													
26	OTHER												
27	Filing Fees												
28				\$1,080			\$1,080		\$1,080		\$1,080		\$4,320
29	State bar Membership Fees												
30	<b>Total DAS Operating Expenses</b>												
31				\$4,389			\$8,779		\$8,779		\$8,779		\$30,726
32	<b>HSA #3</b>												
													10/22/2020

**Operating Expense Detail**

Total